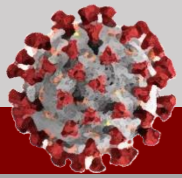


# Entering, Assigning, and Beginning Monitoring

## COVID-19 Community Team Outreach

To enter a contact into the system manually, you will visit the New Contact Screen and add as much info as possible.

### Contacts Tab

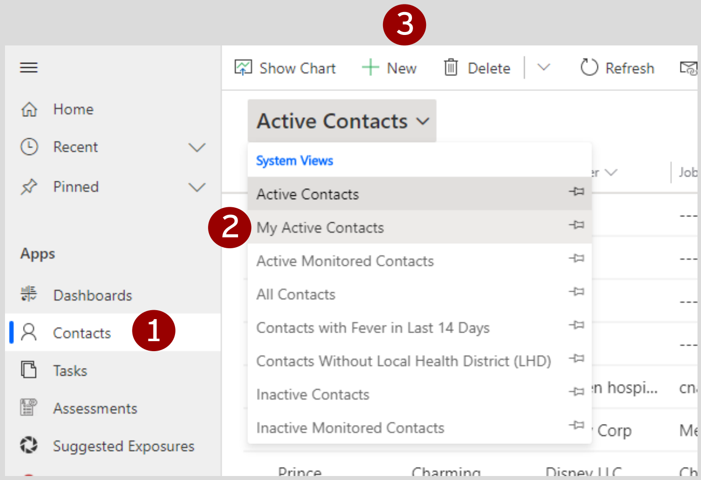
*The Contacts Tab is your center of operations for reviewing and adding contacts.*

1. Navigate to the Contacts tab.
2. To see your contacts, click "Active Contacts" and select "My Active Contacts."
3. To input a new contact, select "New."

1 **Contacts Tab**

2 **My Active Contacts**

3 **New Button**




### New Contact Screen

These fields are required to help us properly track our data and slow the spread of COVID-19. Ensure you properly input the following information, **including the NC EDSS Event ID of the patient who named this contact:**

**First Name**

**Last Name**

**NC EDSS Event ID**

**Last Date of Exposure**

### Monitoring Info Needed

These fields about your contact are required to help initiate and manage your monitoring efforts. Input as much information as possible:

**Contact Information**

*As much as possible*

**Date of Birth**

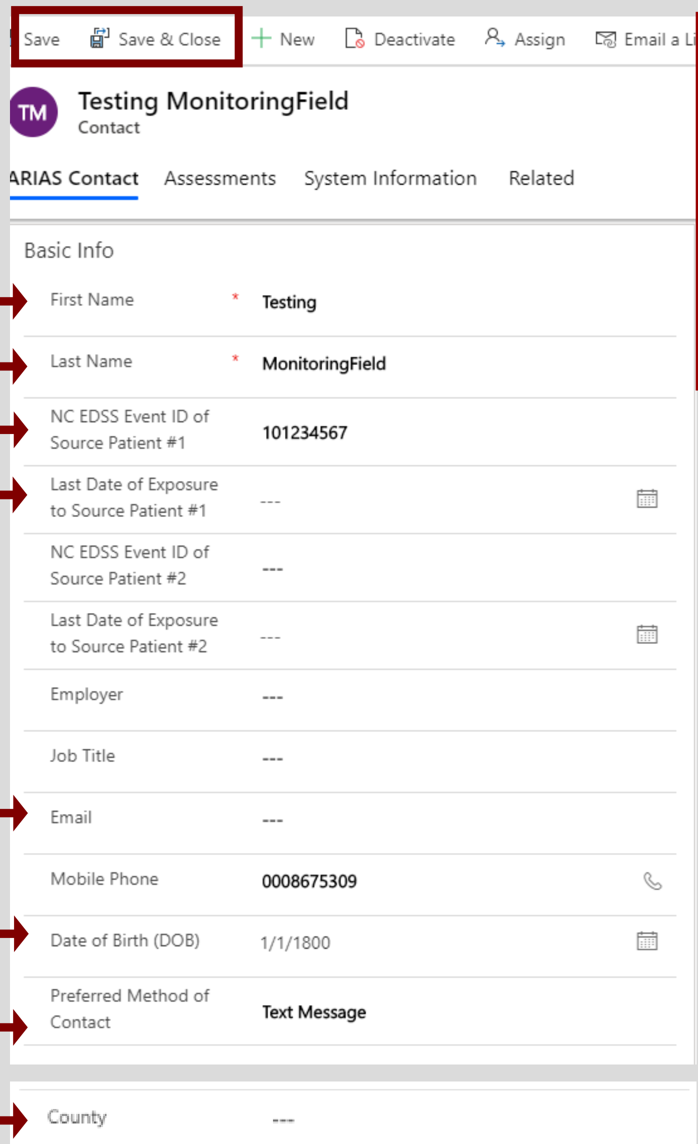
*Required to begin digital monitoring*

**Pref. Method of Contact**

*Determines how outreach occurs*

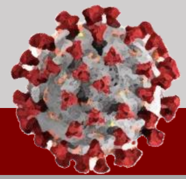
**County** *(in "Address")*

*Entering the county will attach the contact to their LHD*




**Always click "Save" or "Save and Close" at the top left to record your work.**

# Entering, Assigning, and Beginning Monitoring



## COVID-19 Community Team Outreach

After you have saved your contact, you can assign and begin monitoring from their profile.

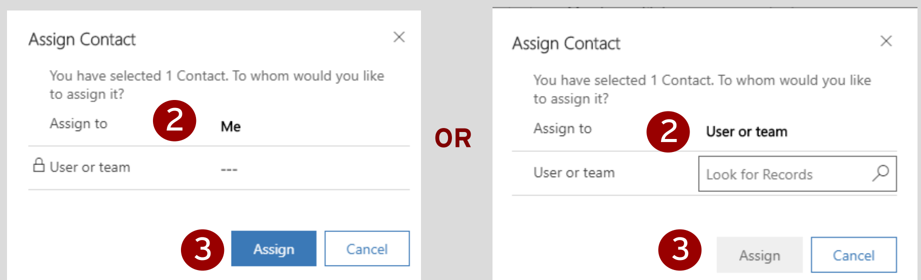
### Assigning a Contact

1. Navigate to the "Assign" box at the top of your screen to produce the "Assign" screen.
2. The system defaults to "Assign to Me." **You can also single click "Me" to toggle "User or Team," and then type the name of a new assignee in the "Look for Records" box.**
3. Click "Assign" when finished.

1 **"Assign" box**

2 **"Me"/"User or Team"**

3 **"Assign" button**

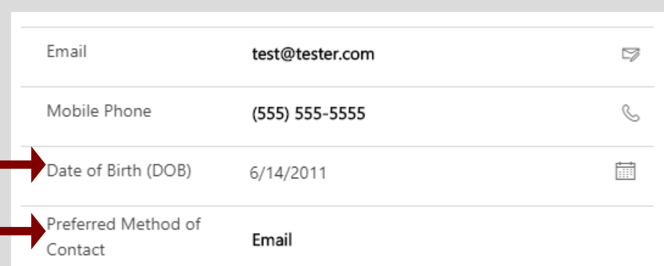

### Triggering Monitoring

*If you have provided an email or mobile phone, **"Begin Monitoring" will trigger automated daily emails or texts (per your contact's "Preferred Method of Contact")** that invite your contact to complete an assessment.*

***To begin digital (text or email) monitoring, you must have a contact's date of birth (DOB) in the system.** The contact's DOB serves as their verification to log in to their online assessment.*

**Date of Birth**

**Pref. Method of Contact**

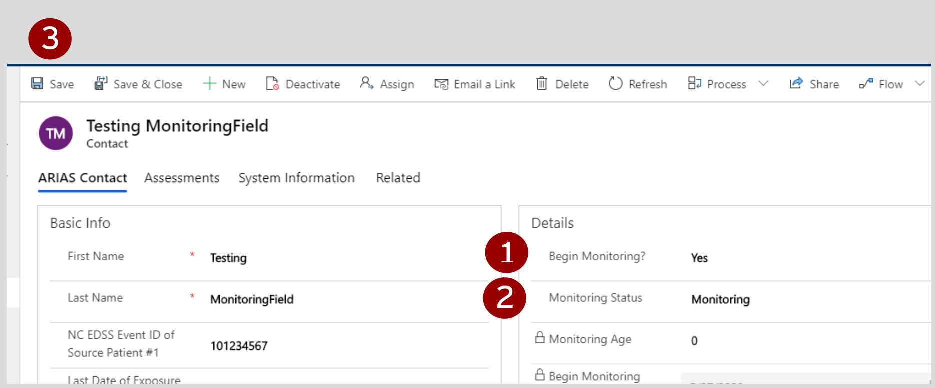



1. **To trigger monitoring,** change "Begin Monitoring?" to "Yes."
2. Change "Monitoring Status" to "Monitoring."
3. Click "Save" to record your work and dispatch the digital assessment.

1 **"Begin Monitoring?"**

2 **"Monitoring Status"**

3 **Save**




**Per your training, don't forget to create appointments in the Timeline/Activities section to ensure monitoring takes place.**